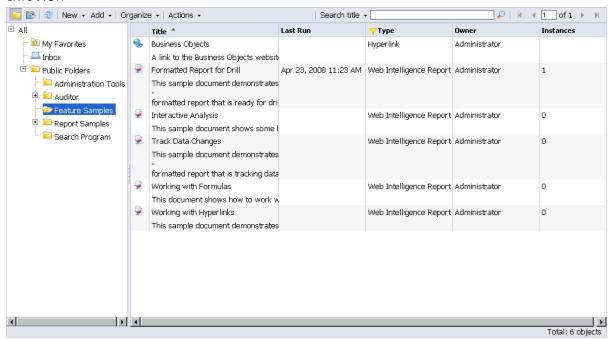


Procedure

1. Start the transaction using the menu path or transaction code.

InfoView



2. Press[Enter] to continue.



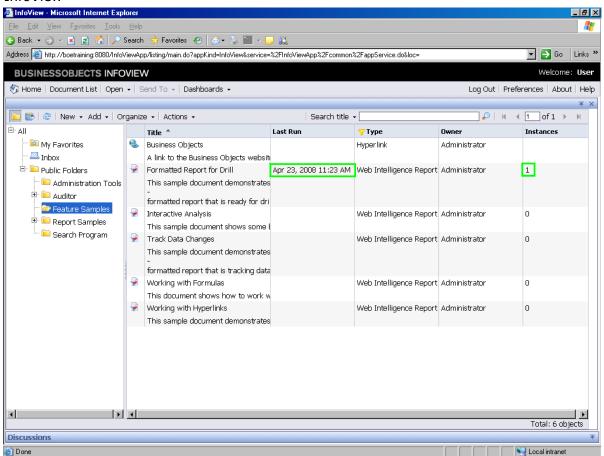
Scheduling an object allows you to run it automatically at specified times. When you schedule a document, you can specify several settings, such as the destination and delivery format. This ensures you are receiving and distributing documents that contain the most up-to-date information available.

When a scheduled object runs successfully, InfoView creates an instance. An instance is a version of the object that contains data from the time that the object was run.

In this scenario you will schedule a document to run now so that you can view the latest instance, then you will schedule it as in Adobe Acrobat format to be delivered to your Inbox. You will also learn about some of the other scheduling features available.

Press [Enter] to continue.

InfoView



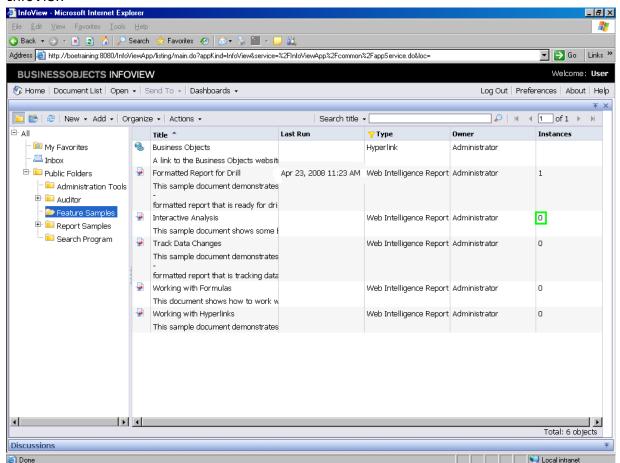


Press[Enter] to continue.

You can also tell the amount of times a document has been previously scheduled by the number listed on the right-hand side. In the example below, the document has been run once at $4/23/2008\ 11:23\ AM$.

Press [Enter] to continue.

InfoView



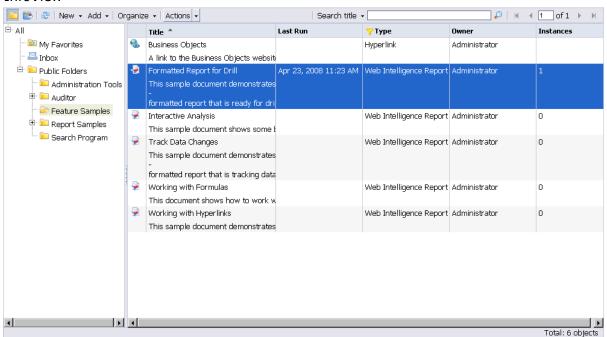
4. Press[Enter] to continue.



You cannot view a report instance unless it has been previously scheduled. You can tell if a document has not been scheduled if the number of instances is 0.

Press [Enter] to continue.

InfoView

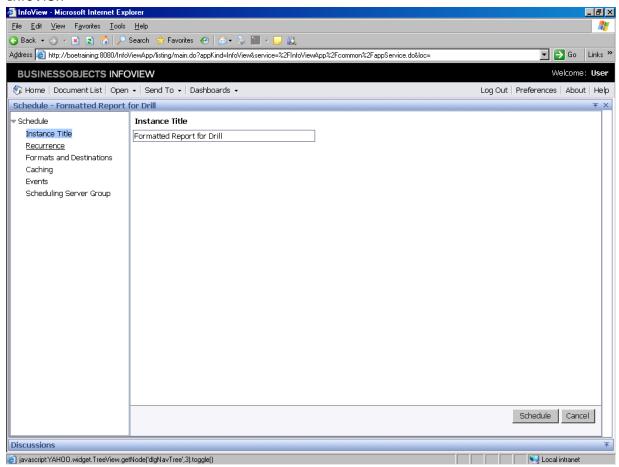


5. Click the **Actions** drop-down menu.

You will now practice scheduling a document. With the document selected, you select the schedule option from the Action drop-down menu.

6. Click Schedule.

InfoView



7. Click **Schedule**.

In the **Instance title**text box you can create a unique name for the instance by changing the name of the report in the Instance title field.

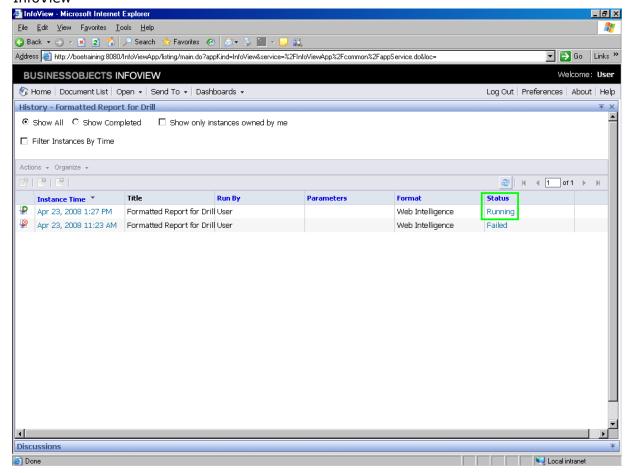
There are several scheduling options available to ensure you have the latest information available to you when you need it. When you schedule an object, your System Administrator may have already specified some of the scheduling options. You can choose to schedule the object with those predefined settings, or choose your own settings.

From this window you can schedule a document to run now simply by clicking the **Schedule** button below.



Note: Before you schedule objects, be sure to check your time zone setting on the Preferences page in InfoView.

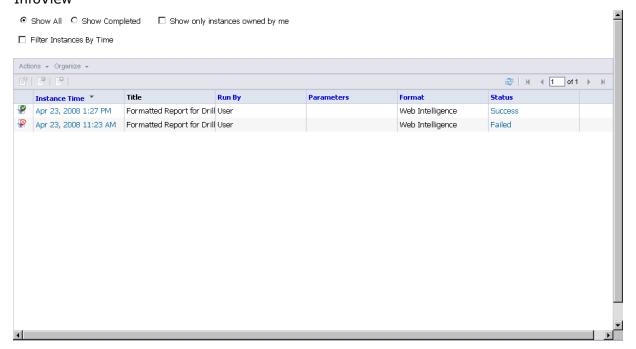
InfoView



8. Click **Refresh** 2.

You are taken to the History page. You know the instance is processing because it is listed as Running in the Status column.

InfoView



9. Click the icon beside the failed instance $^{\@mtext{$arPsi}}$.

The report has been scheduled successfully.

From the history page you can get more information about the scheduled instances for the document. In this case, there is a previous instance of the document that was scheduled but failed.

10. Click the detail icon for more information about the instance \blacksquare .

InfoView

Title:	Formatted Report for Drill
Document Type:	Web Intelligence Report
Status	Failed
External Destination:	None
Owner:	User
Creation Time:	4/23/2008 11:22 AM
Start Time:	4/23/2008 11:22 AM
End Time:	4/23/2008 11:23 AM
Server Used:	BOETRAINING.AdaptiveJobServer
Parent Object Path:	Feature Samples/
Remote Instance in Federated Cluster:	No
Formats:	Web Intelligence
Parameters:	
Error Message:	Your security profile does not include permission to refresh the document. (Error: $\mbox{ERR_WIS_30253})$

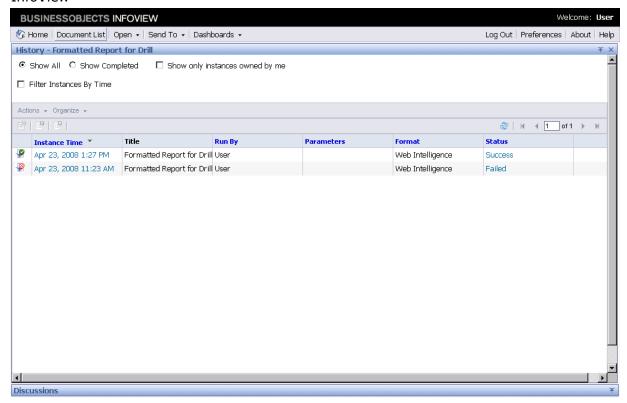


11. Click Back.

This information is useful when troubleshooting failed instances because it provides information on why the schedule failed.

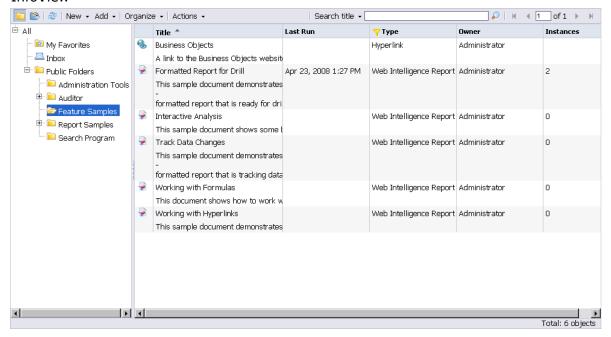
In this example you can see that the failed instance is related to security rights; at the time of scheduling the users did not have permission to refresh the document.

InfoView



12. Click **Document List** to return to the document you just scheduled.

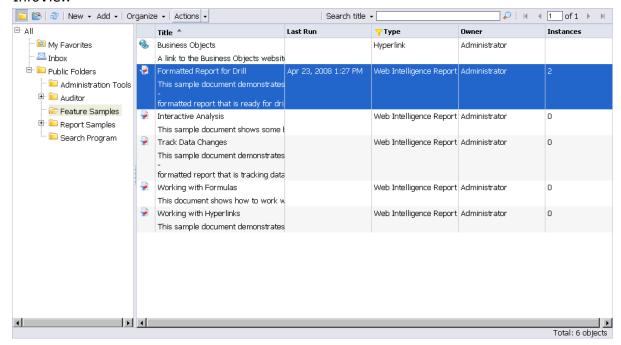
InfoView



13. Select the **Formatted Report for Drill** document row.

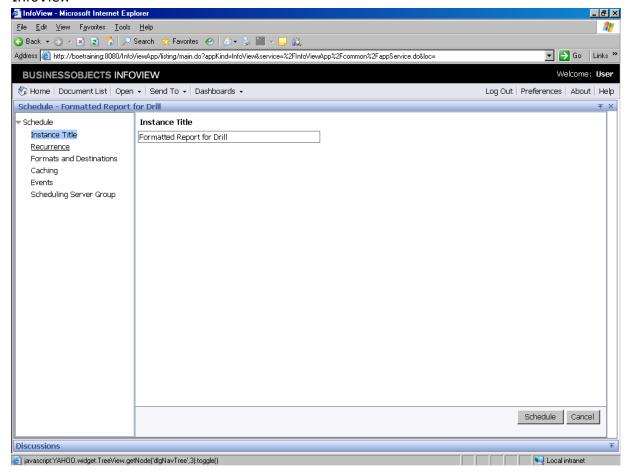
You will now practice scheduling using some basic scheduling options.

InfoView



- 14. Click the **Actions** drop-down menu.
- 15. Click **Schedule**.

InfoView



16. Click the **Recurrence** option.

InfoView



17. Click the drop-down button for the **Run object** selection .



18. Click the **Weekly** list item.

You can schedule your document to run at any time, as well as specify a pattern of recurring run times. For example, you may choose to schedule a document to every morning so you have current data available to you in your Inbox when you get to work.

InfoView

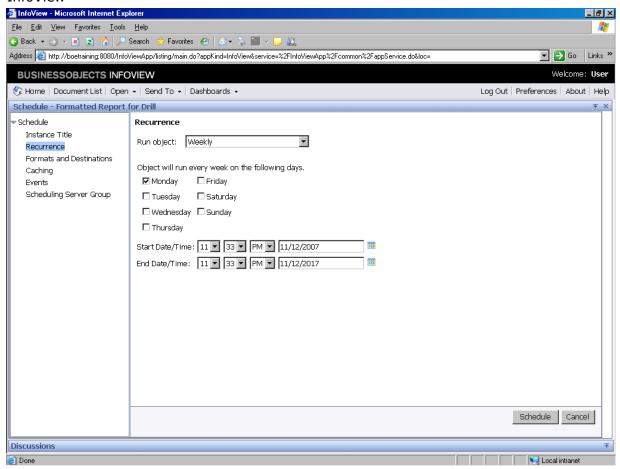


19. Click the **Monday** check box.

When you select an option from the list, you are prompted to specify a time and date range.

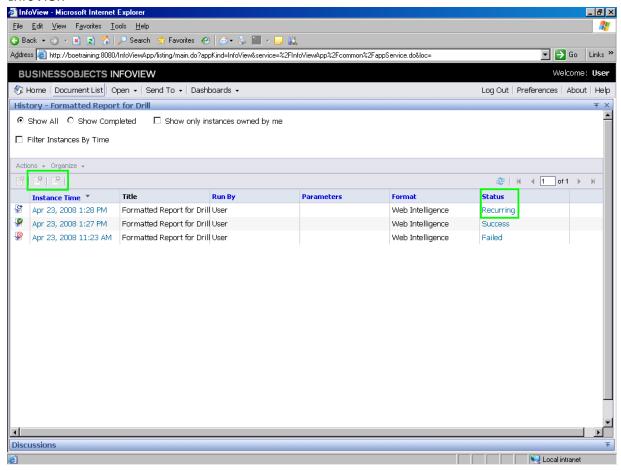
In this example you want to schedule the document to run every Monday.

InfoView



20. Click **Schedule**.

InfoView



21. Click the **Document List** to return to the report you just scheduled.

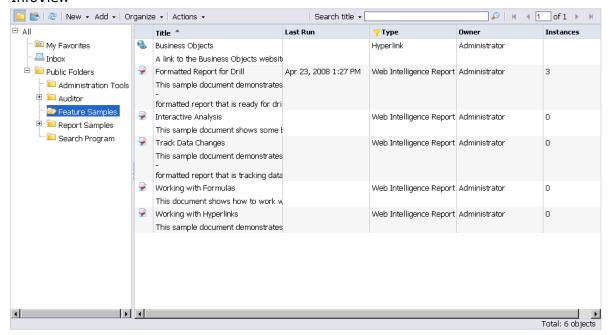
You can see in the status that the document is listed as Recurring, as it is scheduled to run every Monday.

You can use the Pause and Resume buttons to pause and resume an object's instance as needed. For example, if a BusinessObjects Enterprise Job Server is down for maintenance reasons, you may want to pause a scheduled instance to prevent the system from running the object because the object fails when the Job Server is not running. When the Job Server is running again, you can resume the scheduled object. Your System Administrator would advise you if this were to occur.



Note: Pause and resume can be applied only to scheduled instances; that is, they can be applied only to objects that have a status of Pending or Recurring.

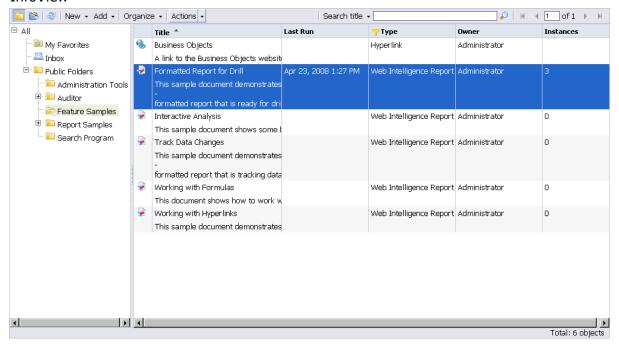
InfoView



22. Select the **Formatted Report for Drill** document row.

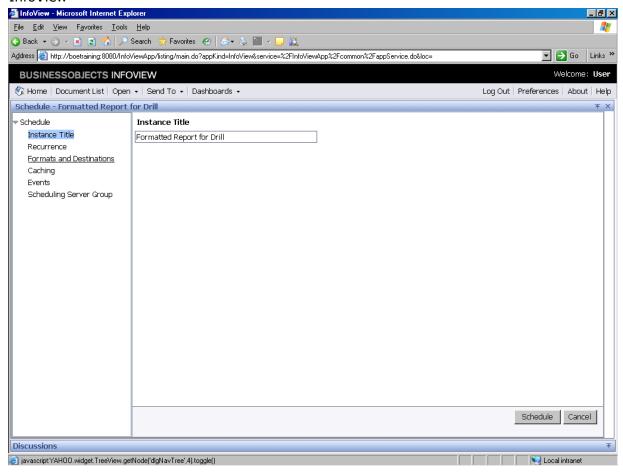
You will now schedule the report using the format and destination features.

InfoView



- 23. Click **Actions** to activate the drop-down menu.
- 24. Click **Schedule**.

InfoView



25. Click the **Formats and Destinations** link.



InfoView

▼ Output Format and Destination

Output Format	Output Format Details
Web Intelligence ☐ Microsoft Excel ☐ Adobe Acrobat	Destinations for Web Intelligence - Formatted Report for Drill Inbox File location FTP server Email recipients

▶ Destinations Options and Settings

26. Click the **Adobe Acrobat** check box.

You have several format options. The format choices available depend on the type of object being scheduled. When you change a report to a different file format, you may lose some or all of the formatting that appears in your report. However, the program attempts to preserve as much formatting as the export format allows.

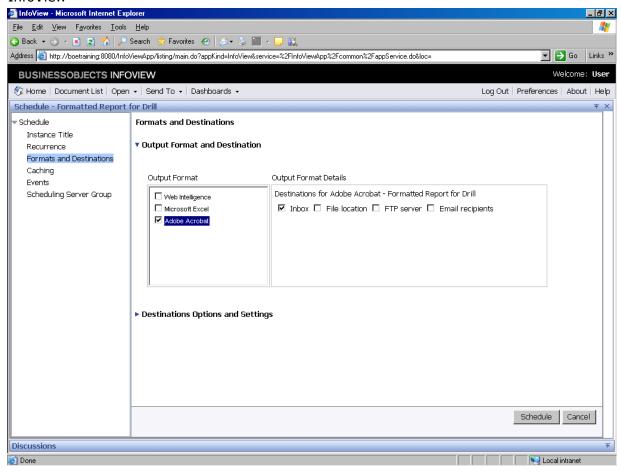
You can schedule an object instance to be sent to a specific destination on your computer, on a network, a default file location, email, or FTP.

This information may be predefined by your System Administrator, or you could modify it yourself. For example, if you choose Email recipients as the Destination setting, you will be prompted to either use the defaulted email recipients (which your Administrator has predefined) or specify different email recipients.

You will now schedule a document so that it gets delivered in Adobe Acrobat format to your Inbox.

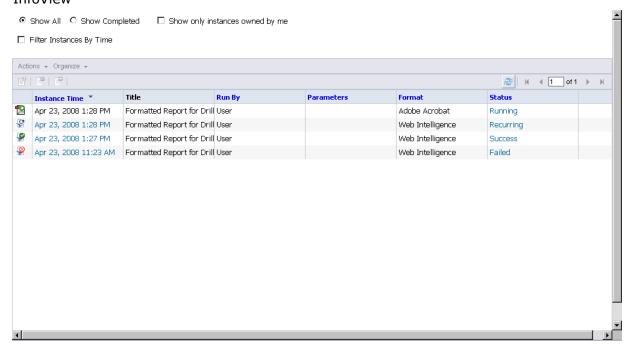
27. Click the **Inbox** check box.

InfoView



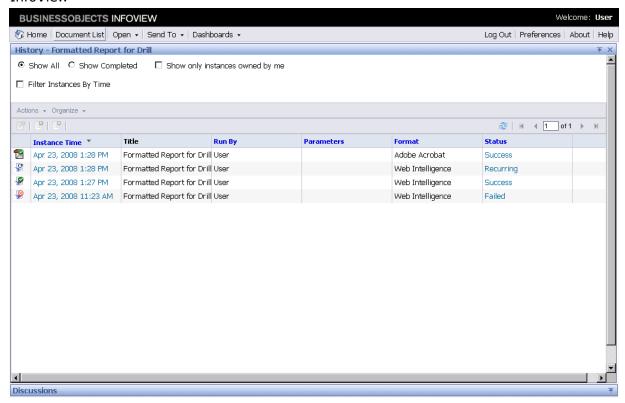
28. Click Schedule.

InfoView



29. Click **Refresh** 2.

InfoView

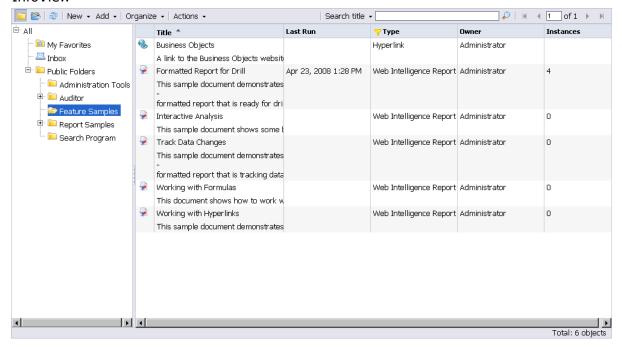


30. Click the **Document List** to return to the report you just scheduled.

You can see in the Status column that the schedule has run successfully.

Now return to the document list so can check that the instance appears in your Inbox.

InfoView



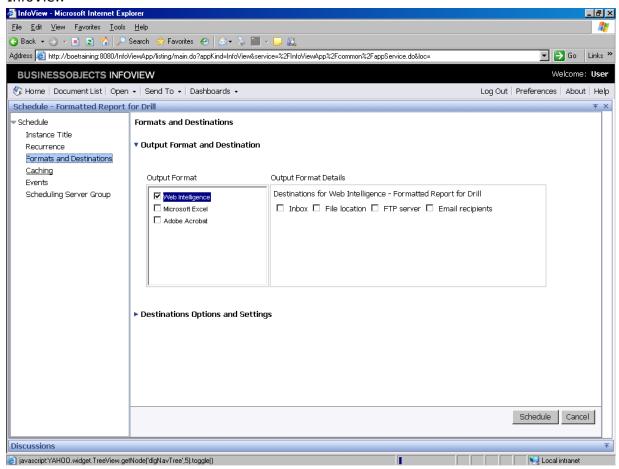
- 31. Click **Inbox**.
- 32. Click the **Feature Samples** folder.

The document appears in Adobe Acrobat format.

Now you will view some of the other scheduling options available to you.

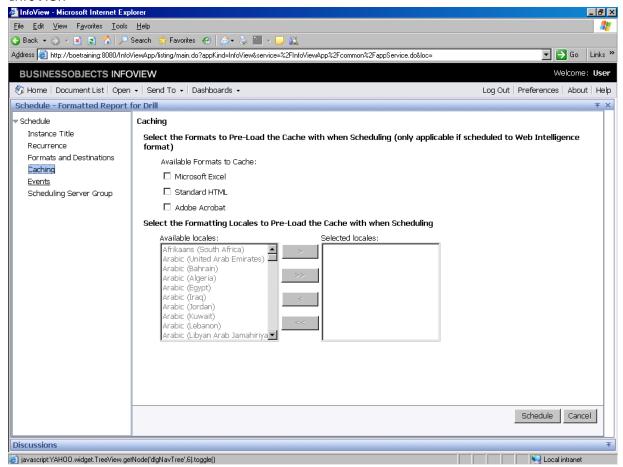
- 33. Select the **Formatted Report for Drill** document row.
- 34. Click the **Actions** button to activate the drop-down menu.
- 35. Click **Schedule**.

InfoView



36. Click the **Caching** link.

InfoView



37. Press [Enter] to continue.

Caching Options will likely be determined by your System Administrator.

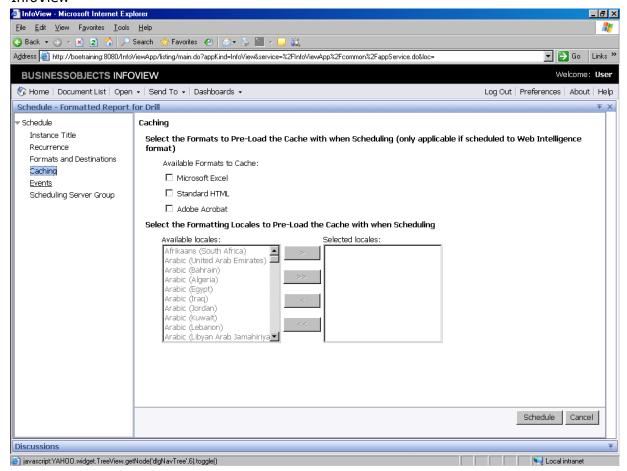
When the system runs a scheduled Web Intelligence or Desktop Intelligence document it stores the instance it generates on the Output File Repository Server. You can also have the system cache the report on the appropriate Report Server by selecting a cache format for the document. If you don't select a cache format, the system won't cache the document.

Note:To select a cache option, the output format you specified for the object must be Web Intelligence or Desktop Intelligence. If you select a different format, the

cache options you specify will have no effect.

Press [Enter] to continue.

InfoView



38. Press [Enter] to continue.

Another scheduling option that you don't see here is for Parameters.

Parameters prompt the user to enter information in a report; this information may determine what data appears in the report. For example, in a report that is used by sales, there may be a parameter that asks the user to choose a region. When the user chooses a region, the report displays the results for that specific region instead

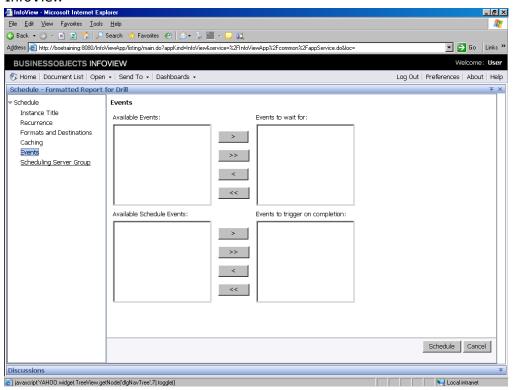
of displaying the results for all of the regions in the report. To set a parameter when scheduling, click the parameter value. You will be prompted to enter the parameter value.

Note:

- -In Web Intelligence documents, parameters are called prompts.
- -If the object that you schedule does not contain parameters, then the Parameter option does not appear on the Schedule page. This is why it does not appear in this example.
- -The appearance of the parameter prompts on the Schedule page may differ from object to object, depending on how the parameter field was created. Program objects may provide an Argument field instead.

Press [Enter] to continue.

InfoView





39. Press [Enter] to continue.

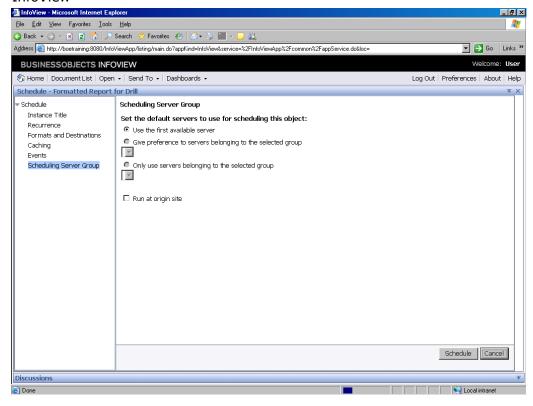
Event-based scheduling provides you with additional control when you schedule objects; you can configure the system so that objects are run only after a specified event occurs. Working with events consists of two steps: creating an event and scheduling an object. That is, once you create an event, you can select it as a dependency when you schedule an object. The scheduled job is then processed only when that event occurs. Your System Administrator will likely be creating the events and you will see them appear here.

To specify an event to trigger the scheduled object, select the event in the Available Events pane, and then click >.

To schedule another event to trigger on completion, click the schedule event in the Available Schedule Events pane, and then click >.

Press [Enter] to continue.

InfoView



40. Press [Enter] to continue.

When you schedule an object, you can select the server group the system uses to run the object.

Note: This setting will likely be set by your System Administrator.

Press [Enter] to continue.